

Client Name: \_\_\_\_\_ Date: \_\_\_\_\_ Phone Number: \_\_\_\_\_

**Office use only**

Client number: \_\_\_\_\_

Preparer: \_\_\_\_\_ Reviewer: \_\_\_\_\_

Personal Return  Business  Rental  Farm

New client <input type="checkbox"/> Yes <input type="checkbox"/> No
Reference: _____

**Section #1**

Address: \_\_\_\_\_

S.I.N.: \_\_\_\_\_ D.O.B.: \_\_\_\_\_ Gender: \_\_\_\_\_

Alternative Phone Number: \_\_\_\_\_ E-mail: \_\_\_\_\_

Spouse name (If separated, name of ex-spouse): \_\_\_\_\_

If we don't file your partner's taxes, please provide this info on their behalf:

Line 23600 Federal: \_\_\_\_\_

S.I.N.: \_\_\_\_\_ D.O.B.: \_\_\_\_\_

Marital status on December 31 2024:  Married  Living common-law  Single  Widowed  Separated  Divorced

Did your civil status change in 2024?  No  Yes Date of change: \_\_\_\_\_

Is this a tax return for a deceased individual?  No  Yes Year of death: \_\_\_\_\_

What was your province or territory of residence on December 31, 2024: \_\_\_\_\_

**Section #2**

Dependent's Information (If new client or new information):

Child's name	Date of birth	Gender	S.I.N.	Post-secondary student	Shared custody
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

**Section #3**

Are you **self-employed / business**?  Yes  No

Do you have **employment expenses**? (T2200 for home office, car expenses, etc.)  Yes  No

Are you a **truck driver** claiming meal expenses?  Yes  No

Do you have one or more **rental properties**?  Yes  No

Did you **dispose** of shares and/or mutual funds (excluding RRSPs and TFSAs) during the year?  Yes  No

Do you or a family member have a **severe impairment** or a **disability**?  Yes  No

If yes, do you have T2201?  Yes  No

Do you have **Canadian Citizenship**?  Yes  No

Have you paid **tax installments**?

If yes, how much? \_\_\_\_\_

*For self-employed individuals:*

Do you have a **GST return** to file?  Yes  No

If yes, do you want us to do it? (Fee of \$85)  Yes  No

*As a Canadian citizen, do you authorize the Canada Revenue Agency to give your name, address, date of birth, and citizenship to Election Canada to update the National Register of Electors or, if you are 14 to 17 years of age, the Register of Future Electors?*

Yes  No

*Do you authorize the CRA to provide your name and e-mail address to Ontario Health (Trillium Gift of Life) so Ontario Health (TGLN) may send information to you by email about organ and tissue donation?*

Yes  No

**Section #4**

**Disposition or deemed disposition of a real property in 2024**

*A real property includes a house, a land, a condo, a cottage, a mobile home, etc.*

Did you sell, transfer, or give away any real property in 2024 to a stranger or a family member?  Yes  No

If yes, have you owned this property for more than 365 days?  Yes  No

Did you start renting out in 2024, any real property that you previously used for personal purposes?  Yes  No

Did you start using for personal purposes in 2024 a real property that you were renting out to a family member or a stranger before that time?  Yes  No

**Home**

Did you pay property tax?  Yes  No

If yes, how much? \_\_\_\_\_

Did you pay rent?  Yes  No

If yes, how much? \_\_\_\_\_

**Investments**

Did you contribute to any RRSP in 2024 or in the first 60 days of 2025?  Yes  No

Did you own or hold specified foreign property where the total cost amount is more than CA\$100,000?  Yes  No

Have you received or transferred (sold, disposed, exchanged, gave, etc.) virtual money (ex: Bitcoin)?  Yes  No

Did you contribute to a FHSA (First Home Savings Account) in 2024?  Yes  No

Did you withdraw RRSP in 2024?  Yes  No

**Student**

Did you pay tuition/education amount?  Yes  No

Did you pay tuition/education amount for someone else, or did someone else ppay for your tuition/education amount?

If yes, do you want to:  transfer it to you  keep it on the T1 of the other person?

**Section #5**

Please note that the basic fare for filing a 2024 tax return is \$150 per person plus tax.

How would you like to sign your documents and receive your statement?

Paper: Mailed (with a \$10 + tax fee)  Paper: Pick up at North Bay or New Liskeard office  Electronically

How would you like to pay?

Online payment at [vsgroup.ca](http://vsgroup.ca)  Cheque  Cash  Visa/Mastercard  E-transfer payments@vsgroup.ca

If you have chosen to sign electronically via Foxit, how would you like to retrieve your original slips?

Mailed (with a \$10 + tax fee)  Paper: Pick up at North Bay or New Liskeard office  N/A: No paper slips

## Service Agreement

By completing and signing this Service Agreement, the Client agrees that:

- They provide VS Group with all slips/papers required;
- The Service Agreement isn't limited to the services listed above. If additional forms/schedules need to be completed in order to prepare the tax return they are automatically included in this service agreement at the current rate;
- VS Group will prepare the return based on all slips/ papers provided;
- VS Group will EFILE the return and provide the Client with a printed return upon receiving payment;
- Additional bookkeeping charges will apply if the records supplied are incomplete or not summarized. Additional bookkeeping is billed at a rate of \$97.00/hour, or as quoted;
- Additional fees may apply for the preparation and filing of other schedules/forms not included with the T1;
- The 72-hour Income Tax Return Preparation Policy is calculated from the time all required information is received at our office and only applies to basic T1 returns. VS Group cannot guarantee completion of the return within this timeline;
- The 5 Business Day Policy applies to all personal returns that have additional income (business, rental, professional, or farm);
- Personal returns dropped off 5 business days prior to the deadline are not guaranteed to be complete before April 30th, 2025;
- Business returns dropped off 5 business days prior to the deadline are not guaranteed to be complete before June 15th, 2025;
- VS Group is not liable or responsible for any late filing fees that may occur to the client;
- Should an audit on the return occur VS Group cannot be held responsible for any CRA assessments or re-assessments. VS Group can however provide the client with audit services at an additional cost, this cost varies depending on the amount of work required.

**TERMS OF PAYMENT:** Payment is an obligation upon the signing of this Service Agreement and becomes due when the work outlined herein is complete. Note that the tax return will not be EFILED until payment of all services is received. Also, note that dissatisfaction with tax return outcome does not void the Terms of Payment obligation.

**IN WITNESS THEREOF,** and intending to be legally bound thereby, the parties hereto have duly executed and delivered this Service Agreement as of the date and year above written.

Client's Signature: \_\_\_\_\_ Date: \_\_\_\_\_